

## What's New in Calm 10.0.2: Axiell Collections for Calm

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## Axiell Collections

Calm 10.0.2, although it does fix some very minor bugs in Calm, mainly exists to provide access to Axiell Collections for Calm. Axiell Collections allows people working with your organization to log in to Calm via a new interface, in their web browser, to search or edit data. It is intended for staff or volunteers to use—the general public still should be using CalmView to search your data. Because it is another interface, Collections should work much in the way you are familiar with in Calm, using the same fields and databases. There are some features in Collections that are new to Calm, however, which are covered in this document. More information about how exactly Axiell Collections works is available at [http://documentation.axiell.com/alm/collections/en/index.html?ac\\_axiellcollections.html](http://documentation.axiell.com/alm/collections/en/index.html?ac_axiellcollections.html) and a Quick Start Guide is accessible at Axiell's Documentation and Download site (<http://www.dswebhosting.info/Documents/>).

In addition to providing a new interface to allow you to work with your pre-existing Calm records, Axiell Collections adds two new features to Calm.

1. Collections uses Word Output templates, which are slightly different from the mail merge templates used in the desktop version of Calm. You can make as many Word Output templates as you would like per database—unlike before, you are not restricted to the pre-existing number of templates. In addition, these templates do not require mail merge. They also allow you to print records to a Word table.
2. The Geolocation field has been added to several databases which allows you to add a location to a record which will be displayed on a map.

## Installation and version

Customers installing Calm for the first time using v10.0.2 or upgrading an existing Calm implementation should use the installation executable called:

### ***Calm1002.exe***

This is available for download from the link publicised by Axiell.

Some versions of documentation refer to the original v10 release as v10, while others refer to it as v10.0. For all purposes, these should be treated as meaning the same thing. V10.0.2 will be used from now on for consistency.

The update should be installed using the instructions in the document ***Calm V10 Installation Upgrade Guide.pdf*** produced 12/02/15 and revised 30/03/15.

If you are installing v10.0.2 as a new clean installation, or if you are upgrading from v10.0/v10.0.1 to v10.0.2 then you should follow the v10.0 installation instructions in the document (substituting the file Calm1002.exe for Calm10.exe, which is mentioned in the document). However, you do not need to run the update utility. This section can be ignored.

If you are upgrading from v9.x directly to v10.0.2 then you should follow all the v10 instructions in the document, including the update utility.

In all cases, we would recommend that customers use v10.0.1 or v10.0.2 rather than v10.0. If a customer already has installed v10.0.1, it is only necessary to install v10.0.2 if that customer would like to use Axiell Collections.

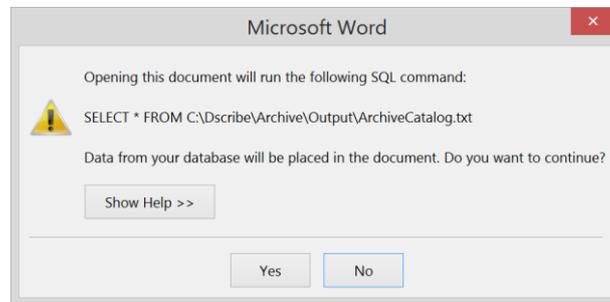
Once installed, the version of Calm will be displayed on the main menu as v10.0.2. This is the official version release number. Calm also has an internal build number. This has no functional meaning.

## Word Output Templates

Word template output formats for Collections are accessed by clicking the Output Formats button on the top toolbar () . They are very similar to Calm's pre-existing mail merge templates. Calm mail merge templates cannot be used as-is in Collections, but can be converted very simply.

To convert a pre-existing Calm template for use in Collections:

1. Locate the template in the dscribe\Archive\Templates folder.
2. Open it in Word.
  - a. If you see the below dialogue box, click **No**. This process does not require mail merge so it is safe to ignore this message.



3. Save it as a .docx file and add a 0 to the end of the file name (e.g. MuseumCatalog.dot becomes MuseumCatalog0.docx). It must be saved in the dscribe\Archive\Templates folder that Collections is using.
4. Locate the xml file for the database the template is used in. It will be in the dscribe\Archive\db folder Collections is using, named for the database it corresponds to (e.g. for the Catalogue, it is Catalog.xml).
5. Open it in a text editor like Notepad.
6. Find the <Reports> section. It may look like:

```
<Reports>
  <Report Template="Templates\ArchiveCatalogue.docx">
</Report>
</Reports>
```

7. Add a <Report Template> entry for the template you just edited. It should be in the form <Report Template="Templates\ArchiveCatalogue.docx"></Report> except you should replace 'ArchiveCatalogue' with the name of the report without the 0 you added. If we had just edited a report called MuseumCatalog0.docx, it would look like:

```
<Reports>
  <Report Template="Templates\ArchiveCatalogue.docx">
</Report>
  <Report Template="Templates\MuseumCatalogue.docx">
</Report>
</Reports>
```

8. Save the xml file and recycle the application pool under which Collections runs. (For more information on recycling the application pool, see this guide from Microsoft: [https://technet.microsoft.com/en-us/library/cc770764\(v=ws.10\).aspx](https://technet.microsoft.com/en-us/library/cc770764(v=ws.10).aspx) )

However, you are not limited to using pre-existing reports. Collections allows you to create as many Word templates as you would like per database, which can be added by repeating the above process (minus steps 1 and 2). The most important differences with prior Calm reports are that for Collections:

- the process for creating templates does not use mail merge. Instead, you simply need to type the field name (use the original field name even if you have renamed the field in the Admin program) inside two pairs of angle brackets (e.g. <<RefNo>> would add the RefNo to a document). Any fields on a document which do use mail merge will still work, however;
- the file extension shouldn't be .dot or .dotx, but .docx;
- by default, this prints every instance of a field: <<Date>> will print every instance of the date field. To print a specific field occurrence, enter the occurrence's number in square brackets after the field name. For example, <<Date[2]>> will only print the contents of the second instance of the Date field. If the specified occurrence doesn't have data, then nothing will be printed for that field reference;
- to print records out in a Word table, the table must have at least 3 rows: the first row must have the text <<StartRecordList>> in the column furthest to the left, the second row must have each of the names of fields in double angle brackets that will be added to the table (e.g. <<RefNo>> or <<Title>>), and the third row must have the text <<EndRecordList>> in the column furthest to the left. It is also possible to add a column on top of these three with headers for each column;
- after setting up a new .docx template as an output format, you must recycle the application pool under which Axiell Collections runs, so that Collections may reload the application structure;
- when printing from a browser the browser may warn you of a pop-up being blocked. You'll have to accept the pop-up. If you don't like the message you can either try to include the Axiell Collections website in your browser's list of trusted applications or switch off pop-up blocking via your browser's settings;

Below you can see some examples of templates.

**Example 1:** the following will print out the text 'Title' and 'Description', as well as the Title and the Date of the item in brackets after the Title. The Title will be in a larger font. It will only print the first instance of the Description field for each record.

**Title:** <<Title>> (<<Date>>)

**Description:** <<Description[1]>>

...prints out as...

**Title:** Minute book (1871-1872)

**Description:** Contains deliberations of the town hall controversy and the hiring of a new relieving officer.

**Title:** Minute book (1873-Oct 1874)

**Description:** Contains licensing debates and deliberations on the town hall controversy.

**Example 2:** the following table will print the RefNos, Titles, and Dates of a list of records in a table. The 'Title' header will be bold and each date will be in italics.

Reference Number	<b>Title</b>	Date
<<StartRecordList>>		
<<RefNo>>	<<Title>>	<<Date>>
<<EndRecordList>>		

...prints out as...

Reference Number	<b>Title</b>	Date
AL/2/1	Minute book	<i>1871-1872</i>
AL/2/2	Minute book	<i>1873-Oct 1874</i>
AL/2/3	Minute book	<i>Nov 1874-1875</i>

## Geolocation Fields

A field named 'Geolocation' has been added to the Catalogue and Places databases. If this field is added to a record you will be able to use the Geographical Map View in Collections (accessed by clicking  on the top toolbar) to view either the current record or all marked records plotted on a map. To add a location to a Geolocation field, enter data as you would in Google Maps (that is, you can enter the name of a place, such as Windsor or Windsor Castle, a specific address such as 12 Castle Hill, Windsor SL4 1NJ, or a set of coordinates such as 51.483890, -0.604422). More information about the Geographical Map View can be found at [http://documentation.axiell.com/alm/collections//en/index.html?ac\\_viewsthegeographicalmap.html](http://documentation.axiell.com/alm/collections//en/index.html?ac_viewsthegeographicalmap.html)

We are investigating adding 'geolocation' as a field type to the Admin program in future versions of Calm so that you will be able to create your own Geolocation fields in any database.